



**LIHEAP
VERSION 4.0**

USER MANUAL

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Introduction

SYSTEM DESIGN

LIHEAP Online is a secure, web-based system developed to manage and deliver LIHEAP utility assistance programs, accessible by all state and agency staff through an Internet connection. The system allows for the secure sharing of client and program data in real-time and allows information to flow easily between state and agency offices. The LIHEAP program is typically customized for each customer so the screenshots and features may differ slightly.

SYSTEM ACCESS

Login

Please access the website provided by the system administrator and login using a secure user name and password. If a user has not yet registered, please contact the system administrator to create an account. The user will see the specified server name at the top center of the login screen so that the user can readily identify whether they are in the production or test system.



Figure Login Screen

Logout

To log out of the system, click Logout on the top right corner of the page, then the LIHEAP Online page will be closed.



Figure Logout Screen

SYSTEM REQUIREMENTS

Browser Compatibility

LIHEAP is currently supported on the Internet Explorer browser versions 8, 9 and 10. No other browsers are supported at this time.

Add-Ons

When printing reports the system will automatically request the user download Crystal Reports. This is an automated download so the user simply has to accept the download. Once accepted they can view and print reports.


Client Management

.1. Allocation and Balance

This is the first screen seen after login. Select the allocation you wish to access and click **Save**. You will then be taken to the main menu where you will see a Bulletin where the system administrator can post any important notifications.

.2. The Client List / Searching For Clients

The entire client list is shown on this page. The user can use the search conditions to narrow the client list. The user simply enters relevant information or selects an entry from the available pick list in the top row in each of the client list columns and then clicks on the binocular icon. The user can select multiple entries to narrow the search function further. At the bottom of the Client List screen the user will find the total number of records and the number of pages specified along with a page scrolling functionality.

If you input more than one search condition, the search result will be the combination of all conditions selected. Once you have selected the criteria, press the  binocular icon button under the **First Name** column.

Client ID= Client ID number

First Name = First name of the client

Last Name = Last name of the client

Street = Client's street address

City = Client's city

Parish = Client's parish

Phone = Client's phone number

Priority	Client ID	Allocation	First Name	Last Name	Street	City	County	Rank	Phone	Intake Worker	Del
1	1045865909	2013 Fast Track	Sandra	Morgan	674567 Brookside Road	Gasquet	Del Norte	27	4015551212	John18	
1	118721640	2013 Fast Track	Scott	Morgan	674568 Brookside Road	Crescent City	Del Norte	19	4015551212	John18	
1	1267439198	2013 Fast Track	Michael	Morgan	673937 Brookside Road	Eureka	Humboldt	18	4015551212	John16	
1	126984082	2013 Fast Track	Tina	Morgan	674338 Brookside Road	Fortuna	Humboldt	30	4015551212	John16	
1	138686419	2013 Fast Track	Thomas	Morgan	674031 Brookside Road	Crescent City	Del Norte	18	4015551212	John9	
1	1410459887	2013 Fast Track	Jennifer	Morgan	673861 Brookside Road	McKinleyville	Humboldt	29	4015551212	John16	
1	1479357308	2013 Fast Track	Emily	Morgan	674562 Brookside Road	Crescent City	Del Norte	29	4015551212	John18	
1	1537726778	2013 Fast Track	Lana	Morgan	673866 Brookside Road	Klamath	Del Norte	25	4015551212	John9	
1	1577574478	2013 Fast Track	Isabel	Morgan	673856 Brookside Road	Fortuna	Humboldt	20	4015551212	John16	
1	1608506550	2013 Fast Track	Moonchay	Morgan	674565 Brookside Road	Crescent City	Del Norte	30	4015551212	John18	
1	1620791440	2013 Fast Track	Tessa	Morgan	674559 Brookside Road	Crescent City	Del Norte	19	4015551212	John18	
1	1793734489	2013 Fast Track	Betty	Morgan	674563 Brookside Road	Crescent City	Del Norte	40	4015551212	John18	

Figure Client List

3. Add Client

To add a Client, login as an agency user and then click the **Add Client** menu item link on the following screen. This will open a blank **Client Information** screen.

Client Information										
Client ID			Allocation	2011 Fast Track		Agency	Hancock Software			
First Name			Middle Initial		Last Name			Applied Date	08/04/2013	
Phone			Phone2			<input type="checkbox"/> Phone Duplicate OK	Intake By	Hancock Support		
Household Demographic										
Occupants			Children 0-2			Monthly Income				
Elderly	<input type="checkbox"/>	Disabled	<input type="checkbox"/>	Children 3-5			Rank			
Poverty Level			Children 6-18			<input type="checkbox"/> High Use	<input type="checkbox"/> High Burden			
<input type="checkbox"/> Migrant seasonal farm worker										
Address					Landlord Information					
Street			Street Type			Name			Phone	
Apt#		Zip		Building Type			Address			
City			County			City			State	
Mailing Address <input type="checkbox"/> Same										
Street			Street Type			Apt#			Zip	
City			County			State			Building Type	
E-Mail Address										
Building Type						Primary Heating Source				
<input type="checkbox"/> Heat in Rent					<input type="checkbox"/> Section 8 Housing					<input type="checkbox"/> DSH in Rent
					<input checked="" type="checkbox"/> Crisis					
Comment										
<input type="checkbox"/> Weatherization Assistance Requested					<input type="checkbox"/> Signature Confirmation					<input type="checkbox"/> Move In/Move Out
<div>Save</div> <div>Cancel</div>										

Figure Client Information

After inputting all necessary information, please click the **Save** button. Then the new client will be added to the system. The critical fields are client ID, which is the head of household's social security number, the city, (from the pick list), and the parish, (from the pick list). Other fields include address, phone number(s), mailing address, landlord information, building type, and primary fuel source. A row exists for entering information on client vulnerability. Please check the pick box if vulnerability is established for this household. Enter appropriate information in the **How** and **Whom** fields. Also, select the means by which the letter was delivered from the pick list. Options are between **Hand Delivered** and **Mailed**. **No dashes are entered for phone numbers and social security numbers.**

When all client application information is entered into the **Client Information, Fuel Usage, Family, Income, Document** and **Employment** screens, the user will return to the **Client Information** screen to click on the **LIHEAP Benefit**, and **WAP Rank** buttons to update these fields. The software will calculate these fields.

If the user is entering a crisis application record, please click on the **Crisis** check box to insure the record will be saved properly. The user will then be able to directly enter the crisis benefit amount into the **Benefit** field. The **LIHEAP Benefit** button will be "grayed out" under these circumstances.

Note, all pick lists include an empty selection at the top of the list to be selected when editing existing selections that need to be deleted.

.4. Eligibility

Eligibility is determined based on the household income for the size of the family in the household. The income amounts are entered in the **Income** screen explained later. Also, the household cannot be serviced more than once within a specified time period. This time period is defined on the **Benefit Allocation** screen (specific to the allocation).

Requirements

Before a client can be eligible for a benefit all required information must be collected. This includes the basic client information, fuel usage, family members and income. Additionally, the **Document** screen must be filled out to show that all required documents have been received.

Priority Rank

A priority rank of 1 means the client is eligible. A priority rank of -1 means the client is not eligible and a priority rank of 0 means the client is incomplete.

.5. Client Information

This is the same screen seen when adding a new client. To Edit **Client information**, select the client that you would like to update from the **Client List**. This will open the current **Client Information** page. The **Client Information** page is where the client demographic and house information are entered. To save the update, press the **Save** button on this page.

Hancock Energy Software Hancock Liheap Online Logout Client Name: Scott Morgan

Back Client Info **Fuel Usage** Family Income Document Client History Liheap Benefit Request Received Benefit

Client Information										
Client ID	158721640		Allocation	2018 Fast Track		Applied Date	02/27/2018			
First Name	Scott		Middle Initial	H		Last Name	Morgan			
Phone	401-5551212		Phone2			Phone Duplicate OK	<input type="checkbox"/>			
Instate By	02/27/2018									
Household Demographic										
Companys	2		Elderly	<input type="checkbox"/>		Disabled	<input type="checkbox"/>		Poverty Level	3
Children 0-2	0		Children 3-5	0		Children 6-18	0			
Migrant seasonal farm worker	<input type="checkbox"/>		Monthly Income	900.00		High Use	<input checked="" type="checkbox"/>		High Burden	<input checked="" type="checkbox"/>
Rank	18		Lyman	<input type="checkbox"/>		Severe Financial Hardship	<input type="checkbox"/>		Hard to Reach	<input type="checkbox"/>
Denial	<input type="checkbox"/>		Medically Needy	<input type="checkbox"/>		Trail Elderly	<input type="checkbox"/>			
Address										
Street	67450 Brookside Road		Street Type	Road		Name			Phone	
Appt			Zip	55511		Building Type	Single		Address	
City	Crescent City		County	Del Norte		State	CA		Zip	
Mailing Address										
Street	5025 Wonderstump		Street Type	Road		Appt			Zip	95511
City	Crescent City		County	Del Norte		State	CA		Building Type	Single
E-Mail Address										
Building Type	SFD - Owner		Primary Heating Source	Electric		Section 8 Housing	<input type="checkbox"/>		SWP in Rent	<input type="checkbox"/>
Chase	<input checked="" type="checkbox"/>		How in Rent	<input type="checkbox"/>		Need Approval	<input type="checkbox"/>			
Benefit Amount	449.00		Additional Amount	0.00		Total Amount	449.00			
Comment										
Weatherization Assistance Requested	<input type="checkbox"/>		Signature Confirmation	<input checked="" type="checkbox"/>		More In/More Out	<input type="checkbox"/>			

Liheap Form LIHEAP Eligible Copy Client Liheap Benefit Save Cancel

Figure Client Info

6. Fuel Usage

As long as you have added a client or chosen a client, you can modify client fuel usage from the following page. The **Fuel Usage** button opens the form **Energy Consumption Information**. The user should enter information into the utility, account number, energy cost, utility allowance, and fuel type fields.

https://liheap.hancockenergysoftware.com/Dev/index_client.aspx?Types=LIHEAP&JobID=674568 index_client Logout Client Name: Scott Morgan

Back Client Intake **Fuel Usage** Family Income Document Client History Liheap Benefit Request Received Benefit

Energy Consumption Information					
Utility	Pacific Power - Electric (12)		Account No	841537660018	
Date	02/19/2013		Total Due	730.48	
Monthly Cost	150.36				
Billing Info: <input checked="" type="checkbox"/> Same as Client					
First Name	Scott		Middle Init.	H	
Last Name	Devoir		Address1	5025 Wonderstump Road	
Address2			City	Crescent City	
State	CA		Zip	95511	
Add	Save		Cancel		Delete
Total: 1			pre next		

Figure Fuel Usage

7. Family (household)

The **Family** screen is used to record a client's family information. You can add or delete a family member's information on this screen. The following are the required data fields: birthday, social security number, and disability. These fields will impact benefit calculations. The remaining fields are important in the specification of demographics for the household and are necessary CSBG data collection points.

The birthday must be entered as xx/xx/xxxx. Failure to follow this format will result in a prompt pop up message to correct to this format. Entering the birthday of the family member will allow the software to populate the proper age category to the right of the screen. **The user does not directly enter the age category information.**

The initial family member screen will default to the head of household entered on the **Client Information** screen, carrying over the first name, last name, and social security number.

The user will click on the **Add** buttons throughout the software screens to add additional records. **Add** buttons are not for saving edited information. Use the **Save** buttons to save information entered into screens.

Client Family Member			
Last Name	Morgan		0 to 2
Middle Name	H		3 to 5
First Name	Scott		6 to 18
Birthday	07/09/1969		>=60
SSN	118721646		Veteran
Gender	M		Parenting
Age	43		Migrant seasonal farm worker
Disability	No		Employment Status
Race	White		Unemployed
Education	HS grad/GED		Relation
Medical Insurance	Medicaid		HH
			Language
			English
			Marital Status
			Married

Add Delete Save Cancel Total: 2

Figure Family

.8. Income

The **Income** screen is used to enter a client's household income information.

This screen is where all income for all family members is entered. Each family member can be selected from the populated column on the left of the screen. All family members will be listed here based on the family member information previously entered. The second column has the pick list of income types to be selected as appropriate. The amount of income is directly entered by the user, and then the frequency pick list is selected. If the pick list item **Hourly** is selected, it is necessary to directly enter the hours per week information in the next column. The software will then calculate the total monthly household income.

Client Family Income

Family Member	Income Type	Pay Amount	Frequency	Hours/Week	Monthly Income
Scott	Gross wages and salary	900.00	Monthly	0	900.00
Denise	No Income	0.00	Monthly	0	0.00
		0		0	0
		0		0	0
		0		0	0
		0		0	0
		0		0	0
Total Monthly Income					900

Save Cancel

Figure Income

9. Document

The document screen is used for the agency to check if their clients have submitted all required documents. Click on **Complete/Not Required** if the selected document has been submitted or is not required. All boxes must be checked for the client to be determined eligible. Once all documents have been checked, click on the **Save** button to save this screen's information.

Document List

Document	Received Date	Complete/Not Required
Energy Intake Form (CSD 43)	03/15/2013	Complete
CA ID		Not Required
SS Card		Not Required
Proof of Income	03/15/2013	Complete
Utility Bill - 1st Current	03/15/2013	Complete
Utility Bill - 2nd Current		Not Required
Landlord Utility Notice		Not Required
Proof of DOB		Not Required

Save Cancel

Figure Document

10. Employment

The **Employment** screen is used to enter employment information for client family members who have income. You can print out an **Employment Letter** to confirm the accuracy of the provided information. A pick list of family members with income previously entered is at the top left of this screen. Selecting the family member(s) will carry over the appropriate fields to the employment screen. The user will directly populate the other necessary information in the fields on this screen.

Hancock Liheap Online

Client Name: Jaimea Anderson
Priority Level: 1

Application Employment Information

Family Member: [Dropdown] Status Date: 08/05/2013

Employer Info

Name					
Street		City		Contact	Tel
Parish		Zip		E-mail	Fax

Client Info

First Name		Last Name		SSN	
Job Title		Employed Date	08/05/2013	Current Active	<input checked="" type="radio"/> Yes <input type="radio"/> No
		Last Date	08/05/2013		

Current Wages/Salary: 0.00 Frequency: [Dropdown]

Buttons: Employer Letter, Save

Figure Employment

.11. Client History

To view client history, click the **Client History** link under the **Client Intake** menu at the client index page. It will open the **Client History** for the selected client. All records of services provided to this client will be listed on this page.

Hancock Liheap Online

Client Name: Scott Morgan
Priority Level: Eligible

Client History

Applied Date	Client ID	First Name	Last Name	Occupants	Crisis
02/27/2013	118721640	Scott	Morgan	2	Crisis

Figure Client History

.12. Benefit Request

When all client application information is entered into the **Client Information**, **Fuel Usage**, **Family**, **Income**, **Document** and **Employment** screens, the user will return to the **Client Information** screen to click on the **LIHEAP Benefit**, and **WAP Rank** buttons to update these fields. The software will then calculate the total benefit amount.

The **Benefit Request** screen is used to request the benefit for a client. The user will select from the utility pick list to the left of the screen (populated by the software from the fuel usage information previously entered by the user). The user can select any number of pick list options then directly enter the amount to be paid to that utility/account. The account number carries over from the fuel usage screen as well.

Client Benefit Request				Benefit Amount :
Utility	Account #	Request Date	Amount	
			0.00	
			0.00	
			0.00	
			0.00	
			0.00	
Total Amount:			0.00	

Save Cancel

Figure Benefit Request

The user cannot enter account credit amounts that total more than the benefit level that appears in the top right portion of the screen. The software will generate a pop up message to inform the user if total benefit requests exceed the benefit level for that client. Following completion of this screen, the user can proceed to requesting payment to the utility account(s) selected.

.13. Received Benefit

This screen is to check the benefit amount received by the current client. Following requesting payment, this screen will be populated by the software with the date of the request.

Client Received Benefit			
Utility	Account #	Invoice Date	Amount
Pacific Power - Electric (12 digits)	841537660018	03/19/2013	443.00
Total Amount:			443.00

Figure Received Benefit

The user can delete the received benefit if the **Agency Invoice** has not been run for this payment. You can simply check the **Del** check box then click on the **Delete** button.

.14. Deleting a Client

To delete a client, go to the **Client List** page, select the client and check **Del**, then press the **Delete** button on this page. The selected client and all the associated jobs for the client are deleted.

Benefits

.1. Request Payment

This screen is used to create a payment based on several conditions shown below to request payments to the utilities for which benefit amounts have been selected for specified clients. Typically the state office reviews these requests by agency and system-wide prior to generating payments to the utilities. The **Request From** field will default to the agency generating the report, (the user's agency). The state can run this report with this field blank to see a comprehensive list of benefit requests, or specify the agency to be reviewed. Click on the **Run** button to view the list of client names, addresses and payments for that time range. If the list is reviewed and approved, the agency will click on the **Save** button. This will then allow the agency user to review the **View Payment** form. If there are errors on the list, the agency user will click on the **Cancel** button. State administrators cannot run these lists, but can review them.

The screenshot shows the Hancock Liheap Online interface. The left sidebar contains a tree view with the following items: Client, Add Client, Client List, Liheap, Allocation, **Request Payment** (highlighted with a red circle), View Payment, Agency Invoice, Liheap Reports, System Admin, Agency, City, County, Fuel Vendor, Agency Coverage, User Type, User, Audit Info, Export Management, Liheap Admin, Budget Allocation, Required Document, Federal Poverty Level, Income Line, Energy Burden Group, High Use and Burden, County Budget, Payment Credit, Poverty Group, County Benefit Matrix, Rank Definition, and Bulletin. The main content area displays the 'Create Payment' form with the following fields: Request Date Range (with 'To' and 'From' sub-fields), Allocation (set to '2013 Fast Track'), Invoice Date, Request From (with a dropdown arrow), and County (set to 'Del Norte'). A 'Run' button is located at the bottom of the form.

Figure Request Payment

.2. View Payment


You can view a payment that is created in **Request Payment**. Click on **Run** to view and a **LIHEAP Payment Request** report appears. This report by vendor can be viewed by agency and state users and it provides the basis for payments to utilities and admin payments to the agencies.

The screenshot shows the Hancock Liheap Online web application. On the left sidebar, the 'View Payment' option under the 'Liheap' menu is highlighted with a red circle. The main content area contains a search form with the following fields:

Invoice Date Range	Allocation	Agency Name	Fuel Vendor
07/29/2013	2013 Fast Track		

Below this is a table with columns: Invoice Date, ClientNumber, Agency Name, and Del. A 'Delete' button is located below the table.

Figure View Payment

To see a list of clients, enter the desired date range, allocation, (which defaults to the current allocation), agency name, (if the user is an agency, this defaults to the user's agency), and if desired, the fuel vendor. Click on the binocular  icon button to view the invoice dates and client numbers.

.3. Agency Invoice

Once payments have been requested this function is used for agencies to create the invoice. Enter the correct date range from the **Request Payment**, make sure the allocation is the correct program/contract and make sure the invoice date is the date for which the invoice is being generated, then click on the **Create** button to create an Invoice.

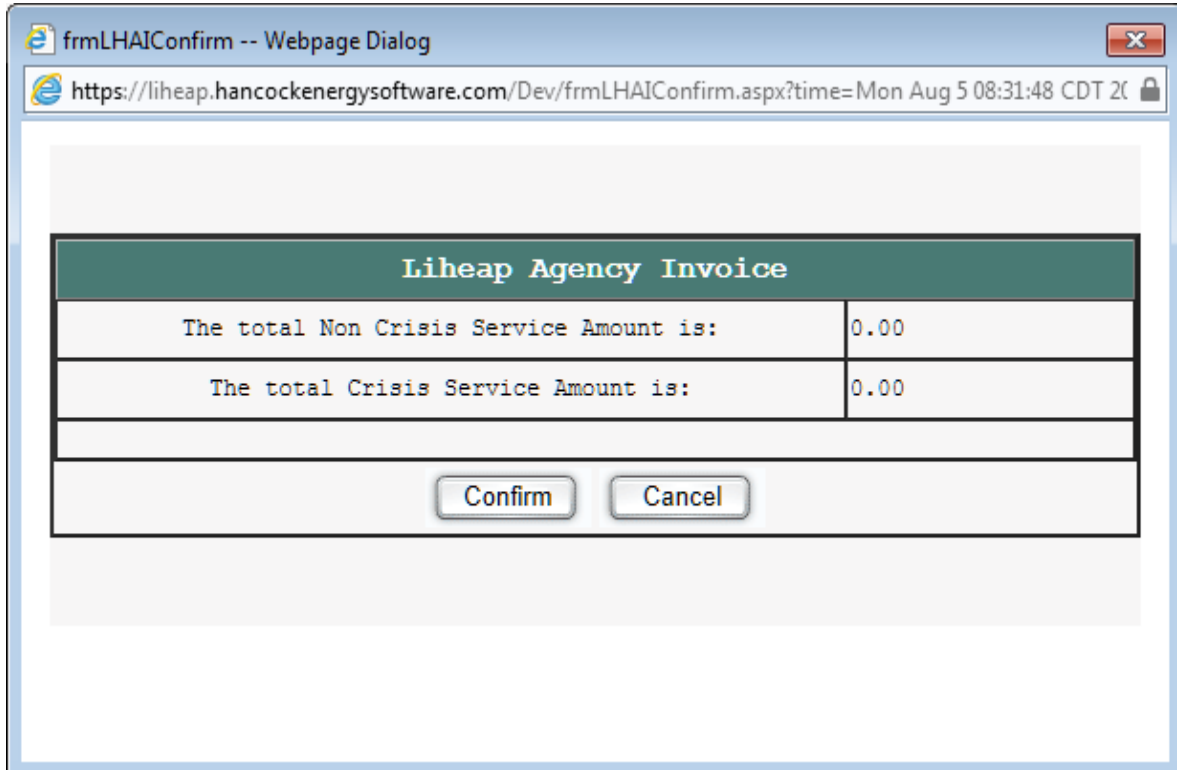
The screenshot shows the Hancock Liheap Online web application. On the left sidebar, the 'Agency Invoice' option under the 'Liheap' menu is highlighted with a red circle. The main content area contains a form titled 'Liheap Agency Invoice' with the following fields:

Liheap Agency Invoice			
Date Range		To	
Agency Name			
Allocation	2013 Fast Track		
Invoice Date			

At the bottom of the form are three buttons: 'Create', 'View', and 'View List'.

Figure Agency Invoice

After you click on the Create button, it will show a pop-up dialog box. See the following picture:



Liheap Agency Invoice	
The total Non Crisis Service Amount is:	0.00
The total Crisis Service Amount is:	0.00
<div>Confirm Cancel</div>	

Figure Agency Invoice

If the Service Amount that shows on the screen does not match the **Vendor Payment** report, do not click on the **Confirm** button. Go back and check all the data to make sure it was entered correctly. The user may also click on the button **View List** to see if an invoice for the date range has been previously created.

The **View** button will show the same **LIHEAP Agency Invoice** created by clicking on the **Create** button. The **View List** button will show the same information, but in a list format.

Reporting

.1. Agency Report

You can get an agency report from this screen. Choose the report name and agency, and then click on the **Run** button. The agency report appears.

The screenshot shows the Hancock Liheap Online interface. On the left is a navigation tree with categories like Client, Liheap, System Admin, and Liheap Admin. The 'Agency Reports' option under the Liheap category is highlighted with a red circle. The main content area is titled 'Agency Reports' and contains a form with the following fields:

Agency Reports	
Applied Date	07/29/2013 To 08/05/2013
Select Report	Incomplete Applicant List
Agency Name	[Dropdown]
Intake Worker	[Dropdown]
<input type="button" value="Run"/>	

Figure Agency Reports

Incomplete Applicant List

A list of applicants whose priority level is incomplete, meaning required eligibility documentation hasn't been received.

Incomplete Letter Report

Notifies the customer of which required eligibility documents have not been received.

Client Qualification List

A list of applicants organized by allocation and showing their name, address, amount received, crisis and service date.

Applicant Denial List

A list of applicants denied based on the application process.

Applicant Denial Letter Report

A deferral letter sent to a group of deferred clients that are not eligible for the program because they are over-income.

.2. Payment Report

To run a production report, enter the desired date range (at the agency level the **Agency** field will default to your agency). The state administrator can run a full system-wide report by leaving the **Agency** field empty, or select the agency desired. Enter the desired **Utility** or leave this field blank and all utilities will show on the report.

To run the **DHHS Report**, simply click on the **DHHS Report** button, and this formal report structured to satisfy the system administrator's reporting responsibility to the funding source is available, populated with system information as required.

The screenshot displays the Hancock Liheap Online software interface. On the left is a navigation menu with categories like Client, Liheap, System Admin, and Liheap Admin. The 'Payment Report' option under the Liheap category is highlighted with a red circle. The main area shows a 'Payment Report' form with the following fields: Date Range (07/29/2013 to 08/05/2013), Agency Name (dropdown), Utility (dropdown), Allocation (2013 Fast Track), County (dropdown), and First Letter of Last Name (text input). Below the form are buttons for Production, County Production, Payment Export, Vendor Payment, Statistical, Budget Tracking, and a DHHS Report button.

Figure Payment Reports

Production

A breakdown of assistance by utility provider including number of families, number of occupants, number of children, number of elderly and the payment amount.

Parish Production

A breakdown of assistance by parish including number of families, number of occupants, number of children, number of elderly and the payment amount.

Payment Export

A comma separated list of payments that can be sent to a vendor for upload into their system.

Vendor Payment

A report for each vendor showing the clients and the amounts paid broken out by parish.

Statistical

This report shows a statistical breakdown for both crisis and non-crisis clients by household, type of people assisted and poverty level.

Budget Tracking

Shows the contracted budget, expenditures for selected period and year-to-date and the remaining budget balance.

DHHS Report

Creates the **LIHEAP Household Report for-Federal Fiscal Year 2012--Long Form**. This report shows households assisted and number of applicant households broken out by poverty levels and vulnerable populations.

Administration and Maintenance

.1. Agency Coverage: City, Parish, Fuel Vendor

Select the radio button next to **City, Parish, or Fuel Vendor** to enter/update information for the city, parish, or fuel vendor information for the selected agency. To add a new entry use the blank line at the bottom of the screen picking selections from the drop down lists. To edit an existing record, simply update the appropriate information, and to delete a record check the **Delete** box to the right of the row. Once the changes are made click **Save**.

Short Agency	County	Delete	Removed
<input type="radio"/> City	<input checked="" type="radio"/> County <input type="radio"/> Fuel Vendor		
CAPOC	Orange County	<input type="checkbox"/>	<input type="checkbox"/>
HES	Del Norte	<input type="checkbox"/>	<input type="checkbox"/>
HES	Humboldt	<input type="checkbox"/>	<input type="checkbox"/>
HES	Orange County	<input type="checkbox"/>	<input type="checkbox"/>
RCAA	Del Norte	<input type="checkbox"/>	<input type="checkbox"/>
RCAA	Humboldt	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>

Figure Agency Coverage

.2. Users (and User Type)

Use this screen to add/update users with access to the LIHEAP system. Search for a specific user by entering their user name in the blank field under the **User Name** heading, and/or search for an agency by selecting the agency from the drop down list. Once entered, click the binocular



icon button. Create new records by entering the information on the blank line at the bottom of the screen. After entering/updating information click **Save**.

The **User Type** comes from the **User Type** screen. This screen allows you to user types (roles) which define what sections and features a user has access to. Click on the **Role Right Definition** link. This will open the **Role Rights** screen where roles are defined. The **Menu Group** option at the top of the screen has three options, one for each of the left-hand menus, **Top Menu** (top level menu), **Client Menu** (the menu seen when you select a client record), and **Project Menu** (used for multi-family projects). Within each menu group select the specific screens the role has access to. Additionally, click on a screen link to drill into the details of that screen where specific buttons can be checked as visible or read only. Click the **Save** button on each screen to save the changes.

UserID	User Name	Agency	Phone 1	Login Name	Password	Login Date	Inactive	User Type	Need Changing Password
1	Hancock Supp	Hancock Software		support	Change	08/08/2013	<input type="checkbox"/>	Administrator	<input type="checkbox"/>
2	John2	Redwood Community Action Agency	(901)555-1212	John2	Change	01/27/2013	<input type="checkbox"/>	Agency Administrator	<input type="checkbox"/>
3	John3	Redwood Community Action Agency	(901)555-1212	John3	Change	03/19/2013	<input type="checkbox"/>	Agency Administrator	<input type="checkbox"/>
4	John4	Redwood Community Action Agency	(901)555-1212	John4	Change	03/22/2013	<input type="checkbox"/>	Agency Administrator	<input type="checkbox"/>
5	John5	Redwood Community Action Agency	(901)555-1212	John5	Change	02/28/2013	<input type="checkbox"/>	Agency Administrator	<input type="checkbox"/>
6	John6	Hancock Software	(901)555-1212	John6	Change	12/10/2012	<input type="checkbox"/>	Administrator	<input type="checkbox"/>
7	John7	Community Action Partnership of Orange County	(901)555-1212	John7	Change	12/09/2012	<input type="checkbox"/>	Agency Administrator	<input checked="" type="checkbox"/>
8	John8	Community Action Partnership of Orange County	(901)555-1212	John8	Change	03/21/2013	<input type="checkbox"/>	Agency Administrator	<input type="checkbox"/>
9	John9	Redwood Community Action Agency	(901)555-1212	John9	Change	03/22/2013	<input type="checkbox"/>	Agency Manager	<input type="checkbox"/>
10	John10	Community Action Partnership of Orange County	(901)555-1212	John10	Change	12/20/2012	<input type="checkbox"/>	Agency Manager	<input type="checkbox"/>
11	John11	Redwood Community Action Agency	(901)555-1212	John11	Change	12/26/2012	<input type="checkbox"/>	Agency Administrator	<input type="checkbox"/>
12	John12	Redwood Community Action Agency	(901)555-1212	John12	Change	12/25/2012	<input type="checkbox"/>	Administrator	<input type="checkbox"/>

Figure User

Role Name	Role Description	
Administrator	Administrative Rights	Role Rights Definition
Agency Administrator	All Agency Rights (+ Admin Controls)	Role Rights Definition
Agency Manager	All Agency Rights (- Admin Controls)	Role Rights Definition
Agency General User	Agency Manager Rights (- Financial, R	Role Rights Definition
Agency Fiscal User	Fiscal + Read-only rights to clients	Role Rights Definition

Figure User Type

3. Funding Source

This screen is used to define the source of funding for each of the programs. Additional records can be added in the bottom blank row. Fields to the right include **Admin Percent** (percent of total amount paid to the agency as admin expense), **DOE** (funding sources overseen by the Department of Energy), and **DHHS WAP** (funding sources overseen by the Department of Housing and Human Services).

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invoices again using the Old Method. To reach Hancock Technical Support by phone, call: 1-866-358-5217. The email address for Hancock Support is support@hancocksoftware.com The email address

Funding Source

Funding ID	Funding Name	Landlord	Full Name	Contact	Email	Phone	Fax	Street	City	State	Zip	Admin Percent	Contract No	DOE	DHHS Wap
1	DOE	<input type="checkbox"/>	US Department of Energy	Rob DeSor	rob.desoto@ee.doe.gov	303-275-	303-275-	1617 Cole Boulevard MS-1521	Golden	CO	80401	10	DE-FG4803R	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2	DHHS Onl	<input type="checkbox"/>	Department of Health & Human Services									5	DE-FG4803R	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3	DHHS-SUP	<input type="checkbox"/>										0	DE-FG4803R	<input checked="" type="checkbox"/>	<input type="checkbox"/>
4	WAF Expts	<input type="checkbox"/>										0	DE-FG4803R	<input checked="" type="checkbox"/>	<input type="checkbox"/>
5	WAF Max	<input type="checkbox"/>	US Department of Energy	Rob DeSor	rob.desoto@ee.doe.gov	303-275-	303-275-	1617 Cole Boulevard MS-1521	Golden	CO	80401	0		<input checked="" type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>												<input type="checkbox"/>	<input type="checkbox"/>

Client
Add Client
Client List
Data Transfer
Liheap
Allocation
Client Approval
Request Payment
View Payment
Agency Invoice
Liheap Reports
Program Expense
System Admin
Agency
City
Parish
Fuel Vendor
Agency Coverage
Sub Agency
User Type
Funding Source
Contract
Label and Letter
Switch Agency
Audit Info
Data Export
Liheap Admin
Budget Allocation
Required Docume
Benefit Program
Federal Poverty Li
Income Line
Energy Burden Gr
High Use and Bur
Parish Census
Parish Budget
Payment Credit
Benefit Matrix
Bulletin

Figure Funding Source

.4. Budget Allocation

Define the start date, end date and allocation money for all parts of a budget. Additionally, enter additional benefit amounts and the minimum time period between crisis and non-crisis requests.

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using the old method to reach Hancock Technical Support by phone, call: 1-866-358-5217. The email address for Hancock Support is support@hancocksoftware.com The email address for LHFA HES is support@lhfa-hes.com

Client

- ☐ Add Client
- ☐ Client List
- ☐ Data Transfer

Liheap

- ☐ Allocation
- ☐ Client Approval
- ☐ Request Payment
- ☐ View Payment
- ☐ Agency Invoice
- ☐ Liheap Reports
- ☐ Program Expense

System Admin

- ☐ Agency
- ☐ City
- ☐ Parish
- ☐ Fuel Vendor
- ☐ Agency Coverage
- ☐ Sub Agency
- ☐ User
- ☐ Funding Source
- ☐ Organization
- ☐ Label and Letter
- ☐ Switch Agency
- ☐ Audit Info
- ☐ Data Export

Liheap Admin

- ☒ **Budget Allocation**
- ☐ Review Budget
- ☐ Benefit Program
- ☐ Federal Poverty Line
- ☐ Income Line
- ☐ Energy Burden Gr
- ☐ High Use and Bur
- ☐ Parish Census
- ☐ Parish Budget
- ☐ Payment Credit
- ☐ Benefit Matrix

Bulletin

- ☐ Bulletin

Liheap Allocation

Start Date	End Date	Allocation Title	Current	Amount			
7/2/2013	9/30/2014	This is my Allocation	<input checked="" type="radio"/>	\$2,425,265.00			
Grand Total							
				\$2,425,265.00			
WAP Service							
				\$363,789.80			
CSS Amount							
				\$0.00			
Education Amount							
				\$19,402.12			
Total Administration							
				\$242,526.50			
Admin - LHFA							
				\$24,252.65			
Admin - LACAP							
				\$36,379			
CAP Administration Fees							
				\$163,705.40			
CAP WAP Admin							
				\$0.00			
CAP LHEAP NonCrisis Admin							
				\$147,334.90			
CAP LHEAP Crisis Admin							
				\$16,370.58			
LIHEAP Services							
				\$1,799,546.63			
Liheap to be Contracted							
				\$2,425,265.00			
GLService							
GLAdmin							
Additional Benefit	\$100	NonCrisis Month	6	Crisis Month	12	Max Crisis	\$475
Crisis Percent	10%						

Note: mark the allocation inactive to make it not available in other screens

Figure Budget Allocation

5. Federal Poverty Level

Enter the maximum Federal government's poverty level for each family size and program year.

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You can process invoices again

Federal Poverty Level

Year: Search

Year	Family Size	Poverty Level	Delete
2008	1	866.67	<input type="checkbox"/>
2008	2	1166.67	<input type="checkbox"/>
2008	3	1466.67	<input type="checkbox"/>
2008	4	1766.67	<input type="checkbox"/>
2008	5	2066.67	<input type="checkbox"/>
2008	6	2366.67	<input type="checkbox"/>
2008	7	2666.67	<input type="checkbox"/>
2008	8	2966.67	<input type="checkbox"/>
2008	9	3266.67	<input type="checkbox"/>
2008	10	3566.67	<input type="checkbox"/>
2008	11	3866.67	<input type="checkbox"/>
2008	12	4166.67	<input type="checkbox"/>
2008	13	4466.67	<input type="checkbox"/>
2008	14	4766.67	<input type="checkbox"/>
2008	15	5066.67	<input type="checkbox"/>
2008	16	5366.67	<input type="checkbox"/>
2008	17	5666.67	<input type="checkbox"/>
2008	18	5966.67	<input type="checkbox"/>
2008	19	6266.67	<input type="checkbox"/>
2008	20	6566.67	<input type="checkbox"/>
2009	1	903.00	<input type="checkbox"/>
2009	2	1214.00	<input type="checkbox"/>
2009	3	1526.00	<input type="checkbox"/>
2009	4	1838.00	<input type="checkbox"/>
2009	5	2149.00	<input type="checkbox"/>
2009	6	2461.00	<input type="checkbox"/>
2009	7	2773.00	<input type="checkbox"/>
2009	8	3084.00	<input type="checkbox"/>

Figure Federal Poverty Level

6. Income Line

Maximum household income allowed per family size to be eligible for benefits.

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You can

Income Line

Allocation: 2013 2nd DBRS

Family Size	Income Line	Delete
1	1739.00	<input type="checkbox"/>
2	2275.00	<input type="checkbox"/>
3	2810.00	<input type="checkbox"/>
4	3345.00	<input type="checkbox"/>
5	3880.00	<input type="checkbox"/>
6	4415.00	<input type="checkbox"/>
7	4516.00	<input type="checkbox"/>
8	4616.00	<input type="checkbox"/>
9	4716.00	<input type="checkbox"/>
10	4817.00	<input type="checkbox"/>
11	4916.00	<input type="checkbox"/>
12	5015.00	<input type="checkbox"/>
13	5114.00	<input type="checkbox"/>
14	5213.00	<input type="checkbox"/>
15	5312.00	<input type="checkbox"/>
16	5411.00	<input type="checkbox"/>
17	5510.00	<input type="checkbox"/>
18	5609.00	<input type="checkbox"/>
19	5708.00	<input type="checkbox"/>
20	5807.00	<input type="checkbox"/>

Save Cancel

7. Parish Census

Use this screen to record the percent of state program funds allocated to each parish.

Parish ID	Parish	Factor
1	Acadia	0.015473947
2	Allen	0.004572195
3	Ascension	0.015196536
4	Assumption	0.004701993
5	Avoyelles	0.010033887
6	Beauregard	0.005694565
7	Bienville	0.005091357
8	Bossier	0.020562788
9	Caddo	0.059419447
10	Calcasieu	0.039190061
11	Caldwell	0.002668492
Total Factor		1.00093416

Figure Parish Census

8. Parish Budget

Shows the percent entered into **Parish Census** and calculate the budget for each parish. It will also show the balance remaining within each parish.

Parish	Service		NonCrisis Administration		Crisis Administration		Non Crisis		Crisis		
	Budget	Balance	Budget	Balance	Budget	Balance	Budget	Balance	Budget	Balance	
Acadia	64,417.61	17,726.26	4,566.06	953.55	802.07	523.6	54,750.11	400.9	6,275.9	Update Balance	
Allen	25,410.62	301.90	1,799.92	24.92	317.63	0.24	21,599.2	299.03	3,811.5	2.87 Update Balance	
Ascension	67,063.93	121.39	4,751.70	10.12	838.55	0.00	57,021.1	121.34	10,062.0	0.00 Update Balance	
Assumption	23,265.55	375.72	1,647.98	31.31	290.82	-0.01	19,775.3	375.72	3,489.5	0.00 Update Balance	
Avoyelles	45,963.45	150.88	3,255.75	5.75	574.54	6.82	39,068.6	68.84	6,894.5	81.99 Update Balance	
Beauregard	33,030.26	998.56	2,537.38	83.22	215.14	0.00	30,448.9	998.56	2,581.7	0.00 Update Balance	
Bienville	18,637.00	2,439.97	1,320.12	45.12	232.96	158.2	15,841.4	841.45	2,795.5	1,898.5 Update Balance	
Bossier	83,629.86	55.19	6,632.12	2.94	1,170.37	1.66	79,585.5	55.38	14,044.1	19.51 Update Balance	
Caddo	269,180.1	103.38	18,996.10	8.58	3,352.25	0.03	227,953.3	103.15	40,227.0	0.23 Update Balance	
Calcasieu	185,232.0	184.77	14,318.03	19.87	1,117.97	1.53	171,814.6	166.37	13,415.5	18.40 Update Balance	
Total: 8.14											

Figure Parish Budget

9. Payment Credit

This screen is used to offset the benefit costs assigned to client accounts on payment requests that are inactive, or to recover benefits assigned to payment requests for ineligible clients.

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Payment Credit

Allocation: 2008 LIHEAP Express Check #:

Fuel Vendor:

Date Range: To: Invoice ID:

Agency Name:

Invoice ID	Invoice Date	Client Number	Amount	Check Number	Credit
------------	--------------	---------------	--------	--------------	--------

Figure Payment Credit

10. Benefit Matrix

This screen defines the benefit amount based on the energy burden percent and the number of family members (group).in the household.

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Benefit Matrix

Allocation: 2008 LIHEAP Express

Energy Burden Percent: Group:

Energy Burden Percent	Group	Benefit Amount	Delete
25% and Greater	1 to 3	450.00	<input type="checkbox"/>
25% and Greater	4 to 7	500.00	<input type="checkbox"/>
25% and Greater	8 or More	500.00	<input type="checkbox"/>
18% to 24.9%	1 to 3	350.00	<input type="checkbox"/>
18% to 24.9%	4 to 7	400.00	<input type="checkbox"/>
18% to 24.9%	8 or More	400.00	<input type="checkbox"/>
10% to 17.9%	1 to 3	250.00	<input type="checkbox"/>
10% to 17.9%	4 to 7	300.00	<input type="checkbox"/>
10% to 17.9%	8 or More	300.00	<input type="checkbox"/>
9.9% and Less	1 to 3	150.00	<input type="checkbox"/>
9.9% and Less	4 to 7	200.00	<input type="checkbox"/>
9.9% and Less	8 or More	200.00	<input type="checkbox"/>

Figure Benefit Matrix